

---

**From:** Paul Barrett <[REDACTED]>  
**Sent:** Tuesday, August 1, 2017 5:19 PM  
**To:** Jeffrey Epstein  
**Cc:** Richard Kahn  
**Subject:** 2 things to do

Jeffrey

I think we see inflation tick higher in the coming two months after 4 low monthly prints. If that happens we probably see the 10yr move higher by 20-30bps and banks take another leg up.

Buy another \$2mm of XLF (Fins etf). We have \$1mm which is up ~3%.

MXN remains on my radar. If we get to 18.25 I would like to build a position in 5yr Mexican Govt bonds. They yield around 6%. So decent carry and a clear way to get long MXN.

Buy \$1mm if USDMXN gets to 18.2500.

Paul

Paul Barrett

```
[REDACTED]=?xml version=.0" encoding=TF-8"?><!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN"
"http://www.apple.com/DTDs/PropertyList-1.0.dtd">
<plist version=.0">
<dict>
  <key>conversation-id</key>
  <integer>36794</integer>
  <key>date-last-viewed</key>
  <integer>0</integer>
  <key>date-received</key>
  <integer>1501607959</integer>
  <key>flags</key>
  <integer>8590195717</integer>
  <key>gmail-label-ids</key>
  <array>
    <integer>6</integer>
    <integer>2</integer>
  </array>
  <key>remote-id</key>
  <string>735445</string>
</dict>
</plist>
```